



ERNEST ORLANDO LAWRENCE
BERKELEY NATIONAL LABORATORY



INFORMATION TECHNOLOGY
DIVISION

BLI: eRoom Advanced Part 1 Access Rights, Searching & Coordinator Rights

Curtis McDonald
Information Technology Division

Agenda



- **Access rights**
- **Version control**
- **Adding people to your eRoom**
- **Inbox**
- **Searching**



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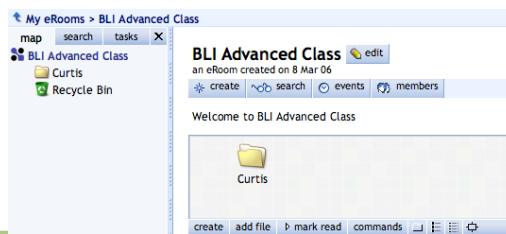
Access Rights



- **Login to eRoom as yourself at <http://www.lbl.gov/eroom>**
- **Open the BLI Advanced Class eRoom**
- **Create a folder with your name**



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Access Rights



- **Open MS Word**
- **Create a new word document**
- **Save to your desktop, e.g. Curtis-word.doc**
- **Drag and drop into your folder in eRoom**
- **Open MS Excel**
- **Create a new spreadsheet**
- **Save to your desktop, e.g. Curtis-excel.xls**
- **Drag and drop into your folder in eRoom**



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Access Rights



IMPORTANT CONCEPT

Default access rights:

- **Anything you create is only editable by you**
~ Or a coordinator of the eRoom
- **Anything you create can be read by everyone**



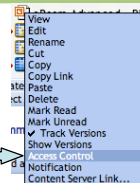
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Access Rights



- **Right click the word doc icon to display options**
 - **Select access control**



- **Select persons who need to be able to read and/or edit the item.**

Access Control governs who can open this file and who can edit it. people.

The people with rights to this file are:

Open Any member who can get to it

Edit CjMcDonald

This file is:

☐ Read-only (not editable)

☐ Hidden (only shown to members who can open it)

☒ Reserved for editing

This item was reserved by CjMcDonald on 16 Mar 06 at 9:53am.

- **If a file is checked out, it will be listed here**



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Exercise #1



Login to eRoom and open the BLI Advanced Class eRoom

While working with a partner:

1. Try to edit your partner's excel spreadsheet
2. What happens?
3. Give your partner access rights to edit your spreadsheet
4. Try to edit your partners spreadsheet again and save your changes back to eRoom



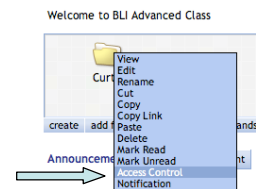
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Access Rights



- Right click your folder name
 - Select access control
- You can select the default access rights for all new documents added to this folder.
 - The owner is equivalent to who has edit rights



Curtis
Access Control

Access Control governs who can open this item and who can edit it.

The people with rights to this item are:

Open Any member who can get to it

Edit Curtis McDonald

This item is:

☐ Read-only (not editable)

☐ Hidden (only shown to members who can open it)

☐ Reserved for editing

An item created in this folder is initially owned by:

☒ The member who created it

☐ The member who created it and the folder owners

☐ Everyone who can open the folder



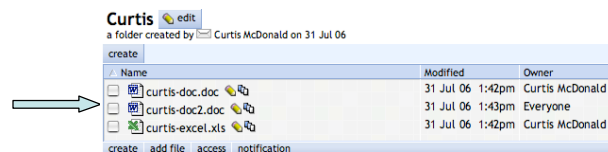
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Access Rights



- **Change default owner of new items to everyone**
- **Rename your word document on the desktop e.g. Curtis-word.doc to Curtis-word2.doc**
- **Drag and drop the doc to your folder**
- **Select detailed view and notice the owner**



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Exercise #2



Default access rights

1. **Change the access rights for your folder to have all new documents initially owned by everyone who can open the folder - if you haven't already**
2. **Create a PowerPoint presentation file and add it to your folder**
3. **Working with a partner:**
 1. **Try to edit your partner's presentation and save the changes back to eRoom**
 2. **What happens?**
 3. **Look at the details for both your files to see the owner**



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Version Control



IMPORTANT CONCEPT

- **Editing versus viewing a document**
- **Clicking a document will open it in view mode**
 - **If changes are made to the document, eRoom will prompt you to save the changes (with plug-in only)**
- **Editing a document will reserve (lock) the file**
 - **Reservation is removed when changes are saved back to eRoom**
 - **If anyone else tries to edit they are notified the file is being edited**



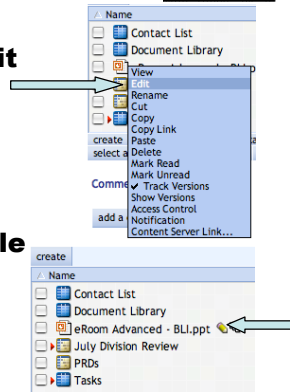
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Version Control



- **Edit your first word doc and reserve it**
 - **Right click icon for file and select edit**
 - **Or, select pencil icon to right of file name (detailed viewing mode)**
 - **Then, you are prompted to edit, rename or add a new version already created**



- ☒ Edit It.
- ☐ Rename It.
- ☐ Add a new version you've already created.



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Version Control



- **After editing is completed**
 - **With plug-in:**
 - ~ **Choose to close word and save when prompted**
 - ~ **File is automatically saved back to eRoom**
 - **Without plug-in:**
 - ~ **Must choose to upload new version**



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Version Control



- **Both prompt for additional version details after file is selected.**

Add Version Note

You can choose a descriptive name for this version of your file, and r

Version Description

Version Notes

- **Important: Do not close window or file changes will NOT be saved. Choose ok or skip for version notes to complete process.**



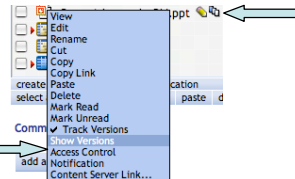
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Version Control



- To view or edit old versions
- Right click document icon and select show versions or click show versions icon
- Can choose to edit older version



Current Version

eRoom Advanced - BLI.ppt
CJMcDonald, 15 Mar 06 4:04pm, 2038 k

Version History

Name	Author	Created	Version
March 15th addition	CJMcDonald	15 Mar 06 4:04pm	2
eRoom Advanced - BLI	CJMcDonald	10 Mar 06 2:05pm	1

select all copy copy link delete mark read mark unread

Version Notes turn off version tracking take a vote add a version note

Notes for version 2 (CJMcDonald, 15 Mar 06 4:04pm)
Additions based upon comments from MLR



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Exercise #3



Version control

1. Check out controls:

1. **Edit (don't view) your word document and power point presentation**
2. **While open, have your partner attempt to edit the same files**
3. **Save changes back to eRoom**
4. **Edit your partner's word document and save changes back to eRoom**



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Exercise #3



2. Show the version information for your word and PowerPoint documents

1. Notice the time, date and author of each version
2. Select an older version to edit
 1. Choose to replace the newest version when prompted
 2. Make changes and save back to eRoom
 3. Choose to show versions
 4. Look at the version number



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Break



- Any questions?



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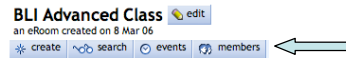
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Adding people to an eRoom

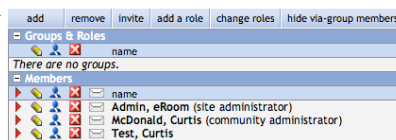


Internal people in LDAP

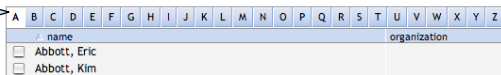
- Click the members button from the root of your eRoom
 - Only available to coordinators
- Click add
- Click first letter of last name and scroll to find the person
 - Or...



Members of the BLI Advanced Class eRoom



Pick the members you want to add to the BLI Advanced Class eRoom.



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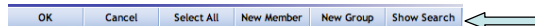
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Adding people to an eRoom



Internal people in LDAP (continued)

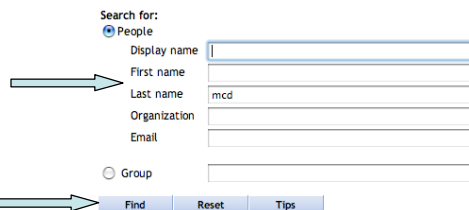
- Click show search button



Choose Members from the LBNL Community

- Enter beginning of first or last name and click find to display

Choose Members from the LBNL Community



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Adding people to an eRoom



Internal people in LDAP (continued)

- Check box next to their name
- Continue searching and selecting members until complete
- Click ok button
- Select the role to apply to the new members
 - Coordinator
 - Participant
 - Observers

Pick the members you want to add

A	B	C	D	E	F	G	H	I	J
name									
<input type="checkbox"/>	McDermott, Gerry								
<input checked="" type="checkbox"/>	McDonald, Curtis J								
<input type="checkbox"/>	McDonald, Joseph								
<input type="checkbox"/>	McDonnell, Andrew								
<input type="checkbox"/>	McDonnell, Erin								

Selected Members:
There are no members selected.

OK Cancel Select All

Choose Role

Assign these members to a new role.

- ☐ Coordinators (controls membership and roles)
- ☒ Participants (working member)
- ☐ Observers (can read, but not contribute)



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Adding people to an eRoom



External people

- Try searching for their name
 - They may already have an account
- To request a new external account send the following information to eroom@lbl.gov
 - Person's name (first and last)
 - Person's email address
 - Company/organization they work for
 - Account number to be used for monthly recharges



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Email inboxes



IMPORTANT CONCEPT

Default permissions for inbox items

- **Email is process every 5 minutes**
- **An email sent to an eRoom will be owned by**
 - **The sender, if member of this eRoom**
 - **The coordinator, if not a member**
- **Can set defaults to be a group, like a folder**
 - **Will not apply to attachments**
 - **To be corrected in a future version**



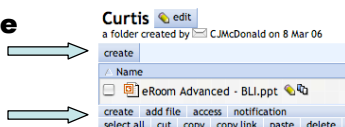
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Email Inboxes



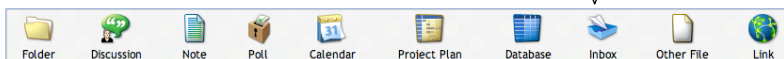
- **Choose create**



- **Select inbox**

Create

What type of item would you like to create?



Create Inbox

Choose a name and email address for this inbox, and add a description if you want one.

- **Select a name** → Name
- **Select the address** → Address @erom2.lbl.gov



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Exercise #4



Email inbox

1. In your folder, create a new email inbox called BLI-(name) e.g. BLI-John@erom2.lbl.gov
2. Login to your LBNL email account via <http://www.lbl.gov/mail>
3. Create a new email message addressed to your inbox and attach a document from your desktop.
4. Return to inbox after next section



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Searching



IMPORTANT CONCEPT

- **eRoom indexes (searches for new information) every 5 minutes**
- **You can only search for data you have access to read**



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Searching



- **eRoom can search for data in all data types**
 - **Word, excel, PowerPoint, AutoCAD, etc**
 - **Database, project plan, email inbox, etc**
- **Two types of searches**
 - **Within an eRoom**
 - **Within all eRooms you have access to**



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Searching



- **Within all eRooms which I have access to**
- **From main eRoom page 'My eRooms' select search the site button**

My eRooms

My eRooms

search the site

Search All eRooms

- **Search for any text**
- **Select date range**
- **Click search**

Search for:

Text

Date any

Search for: ☒ Items ☐ eRooms

☐ Search all eRooms I administer



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Searching



Options for results

1. Click document name to open document
2. Click folder name to open folder containing document
3. Click eRoom name to open eRoom

Rank	Name	Modified	Owner	Found	eRoom
1	b14473.pdf	12 Oct 05 9:49am	CJMcDonald	10g Upgrade	**WCS
2	b14472.pdf	12 Oct 05 9:49am	CJMcDonald	10g Upgrade	**WCS



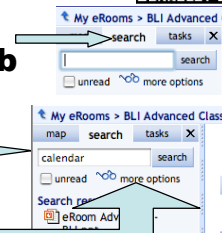
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Searching



- In an eRoom click the search tab
- Search for any text
- Click more options to display details and additional options



Search for:

Text:

Date: any

Owner: Any

☐ Unread Items Only

Rank	Name	Modified	Owner	Found In
1	eRoom Advanced - BLI.ppt	15 Mar 06 4:04pm	CJMcDonald	Curtis

access notification
select all cut copy copy link delete mark read mark unread



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Exercise #4



Email inbox (continued)

6. Open your eRoom inbox and open the message you sent
7. Copy the attachment from the email message to your folder
8. Look at the owner
9. Edit the document



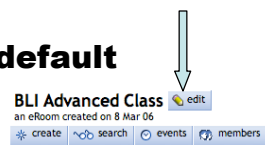
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eRoom Settings



- eRoom settings
 - For coordinators only by default



- Options available
 - Status
 - Name
 - Options
 - Invitation
 - Welcome message
 - Usage reports




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Resources for information



- <http://www.lbl.gov/ITSD/CIS/citg/eroom/>
 - eRoom overview
- <https://eroom2.lbl.gov/eRoomHelp/en/eRoom-7.htm#index.htm>
 - eRoom help page
 - Select  in top right corner of any eRoom page
- Custom eRoom training & consulting from lab eRoom expert.



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Questions?



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